

WHAT IS CLAIMED IS:

1 1. A method comprising:
2 providing a single logical physically distributed
3 information system across one or more information systems of
4 at least two enterprises, wherein the enterprises are being
5 combined; and

6 providing a user interface to access the single logical
7 physically distributed information system to execute one or
8 more merger activities of the enterprises, the merger
9 activities comprising a sales-related integration and a
10 management of sales support activities, the sales support
11 activities comprising addressing one or more customer issues
12 for customer retention.

1 2. The method of claim 1, wherein the merger activities
2 further comprise customer-related communications, the user
3 interface allowing a user to access the single logical
4 physically distributed information system to execute at least
5 one of pre-merger and post-merger activities, wherein the
6 post-merger activities comprise a post-merger assessment and a
7 measurement of one or more achieved synergies.

1 3. The method of Claim 2, wherein the user interface is
2 adapted to the role of the user and a phase of the merger, a
3 security of the user interface is related to the role of the
4 user, the role of the user comprising an executive of one or
5 more sales-related accounts.

1 4. A method comprising:
2 providing a user interface adapted to manage one or more
3 cross-selling opportunities for at least one organization
4 involved in a merger with another organization; and

5 allowing a user to edit one or more cross-selling
6 opportunities presented in the user interface.

1 5. The method of Claim 4 further comprising:
2 providing information for at least one of the cross-
3 selling opportunities in the user interface; the information
4 comprising a financial information;
5 providing a notification template in the user interface;
6 and
7 providing a trigger date in the user interface.

1 6. A system for managing a merger of at least two
2 organizations comprising a module and a graphical user
3 interface adapted to assist retention of one or more customers
4 of at least one of the organizations.

1 7. The system of Claim 6, wherein the system further
2 comprising a first tool adapted to provide predefined
3 templates for customer-related objects, wherein the customer-
4 related objects comprise customer documents and electronic
5 mailings.

1 8. The system of Claim 7 further comprising a second
2 tool adapted to track one or more customer reactions to merger
3 developments, the merger developments comprising merger-
4 related news and merger-related announcements.

1 9. The system of Claim 8 further comprising a third
2 tool adapted to assist in at least one of an assignment, a
3 mapping, and a transfer of one or more customer accounts, the
4 one or more customer accounts including sales-related
5 accounts.

1 10. The system of Claim 9 wherein the third tool is
2 adapted to facilitate a performance comparison of at least two
3 customer-related personnel for at least one of the merger
4 organizations, the two customer-related personnel including
5 two account executives.

1 11. A method for managing a merger of at least two
2 organizations comprising providing a module adapted to
3 proactively identify and present on a user interface a sales
4 counterpart in a first merger organization related to a member
5 of a second merger organization.

1 12. The method of Claim 11 further comprising:
2 producing an electronic mailing, the production of the
3 electronic mailing comprising:
4 importing lists of data, the lists including a customer
5 list and a customer assignment list;
6 consolidating the lists of data, the consolidating
7 including syntactic mapping of one or more character fields;
8 configuring an electronic mailing content; and
9 screening the electronic mailing content, the content
10 including one or more accounts.

1 13. The method of Claim 12 further comprising:
2 delivering the electronic mailing content to a sales-
3 related merger member; and
4 providing an exception workflow for undeliverable
5 electronic mailings.

1 14. A system for planning a merger of at least two
2 organizations, the system comprising an interface presenting
3 financial information for one or more sales-related and

4 customer-related initiatives of at least one organization, the
5 financial information presented in a list or graph.

1 15. A system comprising:

2 sales-related interfaces for a merger of at least two
3 organizations;

4 user interface components adapted to interact with sales-
5 related interfaces; and

6 a layer of application logic services, the layer
7 interacting with sales-related interfaces, and the application
8 logic services relating to the merger.